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**Section IV:**  
**AMENDMENT UNDER 37 CFR §1.121**  
**REMARKS**

**Summary of Telephone Interview**

On March 7, 2005, Examiner Wasylchak, examiner's supervisor Jagdish Patel, and applicant's agent Robert H. Frantz, held a telephone interview at the applicant's agents request in order to consider a proposed amendment.

Applicant's agent explained the significance of the present inventions' ability to assemble "briefing packages" by integrating information in a database with information external to the same database, unlike the system of the cited art which integrates and manages information primarily from within an business enterprise. Certain types of documents and information, such as stock share price quotes, client biographies, news reports about the client company, etc., are integrated to produce the executive briefing packages, which are not handled by the system of the cited art as the cited art system is directed towards other objectives.

The proposed amendment included proposed changes to Claim 1, a method claim, and addition of three claims. During discussion of the proposed changes to Claim 1, it was noticed that the changes had been drafted in the form of system elements, not steps. Applicant's agent agreed to make appropriate correction in the formal reply. Examiner Patel stated that he was not as familiar enough with the present patent application or the lengthy cited art to formally agree that the proposed changes would overcome the cited art without further consideration and search, but both Examiner's stated that they believed that it would be sufficient to overcome the present rejection.

The three additional claims related to a specific feature of the invention which allows additions of information to the briefing packages via receipt of email messages, and especially through parsing of the email messages according to a specific format. Examiner Patel stated that this would require additional searching, and that the addition of new matter should be avoided. Applicant's agent agreed to clearly specify in the formal reply where support for this email-based feature is found in the original disclosure.

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**Rejections under 35 U.S.C. §102(e)**

In the Office Action, Claims 1 - 23 were rejected under 35 U.S.C. §102(e) as being anticipated by U.S. Patent 6,343,275 to Wong (hereinafter "Wong"). Claims 1, 10 and 17 are independent claims. The present amendment cancels claims 4, 6, 14, 16 and 23, such that claims 1 - 3, 5, 7 - 13, 15, and 17 - 22 are pending in the application.

**Claims 1, 10 and 17 Rejected Over Wong**

U.S. Patent 6,343,275 to Wong is directed towards automation of information handling for businesses process related to order entry, order fulfillment and order problem tracking (col. 4 lines 8 - 53). The object of Wong's invention appears to be to allow visibility of what is happening "inside" a company with respect to a particular client's orders, problem resolutions, etc. (col. 2 lines 53 - 57). Wong discloses limited "external influences" which are external communications with an outside or client company such as the placing of an order.

Our invention, however, relates to managing information for sales account executives who are preparing to visit or present to an existing or prospective client, wherein the existing or prospective client is a business entity *outside* the company which is using our invention. By "executive briefing package", we mean a collection of information about an outside business entity including such items as stock quotes, news reports, key contact biographies, previous meeting notes, previous presentations, and action item lists (pg. 3 line 11 through pg. 5 line 6). These executive briefing packages are not the same as the types of information coalesced by Wong's inside order management information system. Additionally, we have disclosed a novel method of adding information to the integrated briefing package by email (pg. 13 line 15 through pg. 14 line 5, Fig. 3 #37).

As such, we have amended our independent claims 1, 10 and 17 to include a number of distinctive steps, elements or limitations not taught by Wong:

- (1) parsing an electronic mail message according to determine a client record to which the message is to be linked;
- (2) forming a "briefing package" as we have defined it;
- (3) integrating database records with at least one external document including stock share price quote, a business plan document, a marketing strategy document, a note from a previous meeting with the client, a previously presented presentation

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- document and an action item list; and
- (4) showing the integrated information in the formed briefing package using expandable subforms which, when expanded, show the linked documents.

Wong is silent as to coalescing these types of information in this manner. For these reasons, we request allowance of claims 1, 10 and 17, and their dependent claims.

Claims 2, 13, and 20 Rejected Over Wong

Claims 2, 13, and 20, depend from Claims 1, 10 and 17, respectively, and specify that the invention parses a subject field of the email to find a client name indicator for use in determining which database record to which to link the email message. Wong is silent is to this step, element or limitation. We therefore request allowance of Claims 2, 13, and 20 for these reasons as well as for the reasons discussed in the foregoing remarks regarding Claims 1, 10 and 17.

Claims 3 and 15 Rejected Over Wong

Claims 3 and 15 depend from Claims 1 and 10, respectively, and specify that the invention links to a stock share price quote server. This has been compared to a screen in the Wong disclosure which allows entry of a company name, which is not the same as accessing a stock share price quote server, and is not the same as "checking stock status" for an item to be ordered (e.g. checking to see if an item is currently in stock). By "stock share price" we mean the price of a share of the corporation as commonly used in stock trading systems such as the New York Stock Exchange.

Wong is silent is to this step, element or limitation. We therefore request allowance of Claims 3 and 15 for these reasons as well as for the reasons discussed in the foregoing remarks regarding Claims 1 and 10.

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Claims 5, 11 and 18 Rejected Over Wong

Claims 5, 11 and 18 depend from Claims 1, 10, and 17, respectively, and specify that the invention integrates and links to word processor files. This has been compared to Wong's disclosure of using "letters" between two business entities. Letters, however, are not synonymous with word processor files, as word processor files may contain other types of documents and information, and as letters may be produced using other devices and processes other than word processor files.

Wong is silent is to this step, element or limitation. We therefore request allowance of Claims 5, 11 and 18 for these reasons as well as for the reasons discussed in the foregoing remarks regarding Claims 1, 10 and 17.

Claims 7, 12, and 19 Rejected Over Wong

Claims 7, 12, and 19 depend from Claims 1, 10, and 17, respectively, and specify that the invention integrates and links to an electronic presentation file. By "presentation file" we mean the type of computer file which is used to store graphic and often multi-media information for conducting business presentations, slide shows, etc., such as Microsoft PowerPoint or Lotus Freelance presentation files.

Wong is silent is to this step, element or limitation. We therefore request allowance of Claims 7, 12, and 19 for these reasons as well as for the reasons discussed in the foregoing remarks regarding Claims 1, 10 and 17.

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Claim 8 Rejected Over Wong

Claim 8 depends from Claim 1 and specifies that the invention integrates and links to an electronic action item list. This has been compared to Wong's "user interface controls for taking action" in Wong's claim 11.

By "action item" we mean the type of "to do" list entry which is typically recorded and tracked during meeting, through which various parties are assigned actions or tasks to complete before the next meeting, as is commonly defined:

Action Item: Something agreed to be done as a result of a discussion at a meeting and usually recorded in the minutes of that meeting. (Source: Wideman's Comparative Glossary of Project Management Terms, found online at: [http://www.pmforum.org/library/glossary/PMG\\_A01.htm](http://www.pmforum.org/library/glossary/PMG_A01.htm))

As such, our "action item list" is not a user control for "taking action", but rather is another type of document integrated and linked into our briefing package. Wong is silent as to this step, element or limitation. We therefore request allowance of Claim 8 these reasons as well as for the reasons discussed in the foregoing remarks regarding Claim 1.

Claims 9 and 21 Rejected Over Wong

Claims 9 and 21 depend from Claims 1 and 17, respectively, and specify that the invention integrates and links to a biographical account of an employee of the client company. By "biographical account" we mean information regarding the client such as a summary document about the employees career highlights, past positions and employers, etc.

Wong is silent as to this step, element or limitation. We therefore request allowance of Claims 9 and 21 for these reasons as well as for the reasons discussed in the foregoing remarks regarding Claims 1 and 17.

Claim 22 rejected Over Wong

Claim 22 depends from Claim 17. For the reasons discussed regarding the amendment to Claim 17, we request allowance of Claim 22 which inherits the same elements and limitations of Claim 17 that distinguish it over the Wong disclosure.

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Summary

The cited reference, Wong's patent, does not properly anticipate the claimed invention, as it fails to disclose all the claimed steps, elements or limitations. MPEP 2131 states:

TO ANTICIPATE A CLAIM, THE REFERENCE MUST TEACH EVERY ELEMENT OF THE CLAIM (*capitalization emphasis found in original text*)

Because the facts of the case as set forth in the foregoing paragraphs and remarks indicate that the cited reference does not properly teach all the steps, element or limitation of the claim, the rejections should be withdrawn.

Additionally, our claims should be allowed in view of our terminology and definitions as provided in our disclosure without using Wong's disclosure to interpret our claims. MPEP 2173.01 states:

**MPEP 2173.01 Claim Terminology.** A fundamental principle contained in 35 U.S.C. 112, second paragraph is that applicants are their own lexicographers. They can define in the claims what they regard as their invention essentially in whatever terms they choose so long as the terms are not used in ways that are contrary to accepted meanings in the art.

Further, MPEP 608.01 states:

The claims should be construed in light of the specification.

The facts of the case set forth in the foregoing paragraphs indicate that the cited reference does not properly teach all the steps, element or limitation of the claim according to the terminology and definitions of the applicant's specification. Therefore, the rejections should be withdrawn.

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**Section III:**

**AMENDMENT UNDER 37 CFR §1.121 to the  
DRAWINGS**

No amendments or changes to the Drawings are proposed.